

Become an Authorized E-File Provider

Process

[PROCESS RETURNS ELECTRONICALLY IN THE LOCALITY - TAX YEAR 2017](#)

Effective Date

01/01/2018

Purpose

Local offices interested in e-filing state tax returns must first become an authorized e-File provider by submitting an application to the Internal Revenue Service (IRS). The IRS will assign an Electronic Filing Identification Number (EFIN) to the local office (assigned by entity not to each person). Once a local office is an authorized e-File provider they may submit federal and state returns or just the state return through the joint federal/state filing programs.

After obtaining an EFIN, the local office will need to purchase software to be used to submit electronic returns. There are several vendors that provide e-File software and each local office should contact software vendors to negotiate for a site license. A list of approved e-File software vendors may be viewed on TAX's official [website](#).

NOTE: Those local offices that already perform e-filing may be able to offer guidance on how to purchase and negotiate for this software.

Special Notes

- The 2017 Individual e-File Guide is an additional resource to help guide you through the electronic filing process. You can view the Guide by visiting TAX's official [website](#).

Procedure

Responsibility

Locality Representative

Steps

1. Access the IRS website and follow the instructions on how to become an authorized e-File provider.
NOTE: Please refer to the official IRS website [link](#).
2. Notify TAX by email once you receive your Electronic Filing Identification Number (EFIN).
NOTE: TAX will use this EFIN to provide e-File credit to the locality.
 - Email Address = ind_efile@tax.virginia.gov
 - Subject Line = New Locality EFIN
3. Acquire electronic filing software for your local office's use.

4. Determine how your office will use e-file.

NOTE: It is important to decide this in the beginning as it will determine how you communicate your service offerings to customers.

- Prepare and file federal AND state tax returns
- File federal tax returns AND prepare and file state tax returns
- Prepare and file ONLY state tax returns

NOTE: The completed federal information will still be needed in order to prepare and file state information. Should the locality choose this filing option, the local office must ensure that the approved tax preparation software purchased for use by the local office supports e-filing of **state only** returns.

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